

June Newsletter 2026



Summer has a way of inviting us to slow down, spend more time with the people we care about, and make memories that last long after the season ends. It's also an ideal time to step back and give your financial life a quick mid-year check-in, so you can enjoy the months ahead with greater confidence and peace of mind.

In this month's newsletter, we're sharing a practical Summer Financial Checklist. We've also included Morgan Stanley's *Thoughts on the Market* podcast exploring one of today's biggest questions: How will AI reshape jobs, and what can history teach us about what's ahead? You'll also find valuable insights on strategies that could help you maximize your Social Security benefits, along with an important look at how multiple retirement accounts can sometimes make it harder to see the full picture of your long-term financial progress.

Whether you're heading to the beach, the mountains, or simply enjoying a slower pace close to home, we hope these resources provide helpful perspective and maybe even inspire a few worthwhile conversations along the way. Wishing you a wonderful start to the summer season.

Warm regards,

The Riverstone Group at Morgan Stanley

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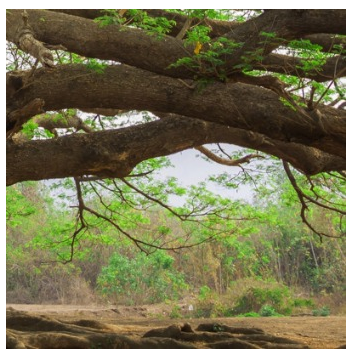
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Named Forbes Best-In-State Wealth Management Teams 2023-2026

Source: Forbes.com (Awarded 2023-2026). Data compiled by SHOOK Research LLC based on 12-month time period concluding in March of year prior to the issuance of the award.

[Awards Disclosures](#)

Insights



Beware of Retirement Sprawl

Are multiple retirement accounts giving you a cloudy picture of your financial performance?

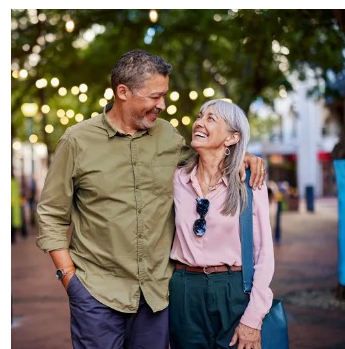
[Learn more](#)



AI and Jobs: What Data and History Say

Our Global Chief Economist and Head of Macro Research Seth Carpenter discusses whether the economy can adapt fast enough to turn AI into a productivity boom rather than a labor market shock.

[Learn more](#)



Married and Retiring? Here's How to Claim Thousands More in Social Security Benefits

Both spouses can collect Social Security retirement benefits based on their own individual earnings record. The amount each receives depends on the age at which they decide to claim.

[Learn More](#)

Financial Summer Checklist

With summer plans taking shape and calendars filling with travel, activities, and time with family and friends, this can be a great opportunity to take a quick look at seasonal spending and planning priorities—helping you stay organized through a busy season. We hope you find these resources helpful!

[Get Started](#)

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